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IMPLEMENTATION OF THE TRADE HUB LIVESTOCK VALUE  
CHAIN PROGRAM FOR THE MALI-COTE D'IVOIRE EXPORT  
CORRIDOR

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# TRADE HUB AND AFRICAN PARTNERS NETWORK

## IMPLEMENTATION OF THE TRADE HUB LIVESTOCK VALUE CHAIN PROGRAM FOR THE MALI-COTE D'IVOIRE EXPORT CORRIDOR

**Contract No.: AID-624-C-13-00002-00**

### **DISCLAIMER**

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# ACRONYMS

<b>FEBEVIM</b>	<i>Fédération des groupements interprofessionnels de la Filière Bétail et Viande</i> (National Federation Group Inter-Professionals Pathway for Livestock and Meat in Mali)
<b>PROSUMA</b>	<i>Société Ivoirienne de Promotion de Supermarché</i> (Ivorian Company Supermarkets Promotion)
<b>USAID</b>	United States Agency for International Development

# EXECUTIVE SUMMARY

In order for *Federation of Inter-Professional Associations for the Livestock and Meat Value Chains in Mali* (FEBEVIM) membership to begin to achieve the volume of exported animals necessary to significantly contribute to the indicators cited<sup>1</sup> in the present Trade Hub work plan for livestock value chains, Trade Hub must assist FEBEVIM membership to begin the process of re-structuring feedlot-export activities so that they are managed by best business practices. Systemic changes in traditional business practices will not occur overnight or for all FEBEVIM membership at once. They will occur over time and will likely be predicated on the success of newly developed and innovative business models that will encourage and stimulate replicative, systemic change among FEBEVIM membership and others.

The major objective of the present short-term technical support was to encourage and guide this process of *re-structuration* by moving forward with on-going efforts to sign a “test” supply agreement between targeted FEBEVIM membership and PROSUMA (*Société Ivoirienne de Promotion de Supermarchés*), and to assess the capacity and commitment of FEBEVIM membership to carry out and continue this process. It is expected that this initial agreement will be expanded into an agreement for the annual supply of both cattle and sheep. During the course of this short term technical support: (1) direct communication between FEBEVIM and PROSUMA management has been established; and (2) PROSUMA has sent a preliminary request for cattle supplies to FEBEVIM, which was responded to the following day after internal consultation among FEBEVIM feedlot network coordinators. Presently, discussions concern the supply of sheep, and once overall agreement has been reached, it is anticipated that FEBEVIM will formally invite the manager of PROSUMA’s meat product supply chain to Bamako, Mali to discuss contract details related to CIF/FOB prices, logistics, terms and method of payment, animal specifications, etc. These activities will precede the signing of a formal supply contract, initially for 50 cattle, and, at the moment, an undetermined number of sheep.

It should be emphasized that this agreement with PROSUMA is just a start towards re-structuring feedlot-export activities by FEBEVIM membership. Assuming that FEBEVIM is able to successfully organize and manage the “test” shipment, further efforts will be required to expand shipments on a monthly and yearly basis, especially in terms of identifying management solutions to “even out” the cost implications of ensuring year-round provision of quality animals from a feedlot system that functions on a “seasonal” basis. Putting in place an equitable and effective management system for FEBEVIM members and strengthening their ability to undertake rapid market surveys, develop well-focused business plans, develop marketing efforts and seriously undertake efforts to secure a range of business partners in the financial, transport/logistic and technical input service sectors will likely require dedicated capacity building support. Without committed commercial partners, it is unlikely FEBEVIM will be able to achieve the anticipated increases in yearly sales anticipated by TRADE HUB<sup>2</sup>. Moreover, FEBEVIM will likely lose market share over time as the Ivoirian meat sector develops and modernizes, unless it also modernizes its supply chain structure and management.

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<sup>1</sup> Trade Hub and African Partners Network. “FY2015 Annual Work Plan.” Prepared for the Trade Hub and African Partners Network by Abt Associates Inc., Bethesda, MD, August 2014.

<sup>2</sup> Presently PROSUMA occupies about 5% of the total meat market in Abidjan, most of which is outsourced locally. Thus, it is likely that other potential partners/market opportunities exist that need to be identified and nurtured.

As this report discusses, FEBEVIM feedlot-export activities are not presently managed in a way to encourage the creation of formal commercial partnerships. Without these strategic partnerships, FEBEVIM membership will not be able to mobilize the investment necessary to establish the market position and to achieve significant economies of scale to remain competitive, particularly in higher-end market segments.

Future Trade Hub support for FEBEVIM should focus on business development, assisting FEBEVIM to establish a framework (business model) to better manage risk, promote investment and add value. Such efforts may also be required in neighboring partner countries implicated in the management of the same supply chain corridor. In this regard a regional approach and vision will take on increasing importance over time.

Traditionally, most countries in the sub-region have undertaken economic development efforts in agriculture and livestock oriented by policies focused primarily on sovereignty and unilateral national interests. This has been the case with food security and it makes little sense, and perhaps livestock exports provide an opportunity to begin changing this mindset. Within the sub-region there is great complementarity between and among countries in agricultural and livestock resource endowment. This is especially the case for the Sahelian countries of Mali, Niger and Burkina Faso and their coastal neighbors. The Sahel is known for its extensive pastoral areas and its feed reserves, which vary across years (due to rainfall patterns) and are increasingly fragile due to the effects of climate change. Coastal countries have a bounty of potential feed reserves, but disease and climatic conditions limit the development of large Sahelian breeds of cattle and sheep that are highly desired in urban coastal markets. It only makes sense to try and integrate these diverse but complementary ecological zones to more efficiently produce food and generate value added for the populations of these regional neighbors. If such changes are to come, they will only materialize based on sound, economically viable business models that have demonstrated success.

# I. INTRODUCTION

The recently completed Bamako-Abidjan corridor livestock trade study<sup>3</sup> recommends that the livestock VC work focus on improving and expanding cattle fattening, as well as continued work on livestock trade facilitation (removal of non-tariff barriers and unnecessary ‘taxes’). Other Trade Hub components will work to strengthen the capacity of the regional livestock umbrella organization, COFENABVI, and to build improved livestock market information systems in West Africa, particularly in the central corridor.

The present short-term technical support assignment will focus primarily on further exploring the feasibility of linking livestock fatteners, initially grouped together under FEBEVIM in Mali, to coastal West African buyers. The tasks will be to:

- Verify that the FEBEVIM cattle fatteners are able to supply a steady stream of fattened cattle, month by month, over the entire year. If there are constraints to doing this, identify them.
- Work with the FEBEVIM cattle fatteners to develop a fattening plan that will produce at least 50 head per month (two truckloads) of fattened cattle to ship to PROSUMA (or other buyers) in Abidjan.
- Prepare specific information to PROSUMA on what Malian cattle fatteners are able to supply (send pictures of characteristic types of fattened cattle) and for which delivery periods.
- Provide assistance in negotiating a contract with PROSUMA.

The main deliverables from this assignment will be:

- A report that summarizes findings and field observations from working with Malian cattle fatteners, and guidance as to next steps.
- A livestock trade contract between a group of Sahelian suppliers (cattle fatteners) and PROSUMA, or significant progress toward such a contract.

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<sup>3</sup> Holtzman, John S., Seydou Sidibé, and Sarah Kozyn. “Opportunities for Increasing Livestock Trade in the Mali–Côte d’Ivoire Corridor.” Prepared for the Trade Hub and African Partners Network by Abt Associates Inc., Bethesda, MD, February 2015.



## 2. OPERATIONAL CONTEXT

An understanding of domestic demand for meat and the commercialization process is essential in order to better appreciate the dynamics and opportunities for expanding Mali's regional livestock exports.

The demand for red meat depends on its price, consumer income, and the strength of preferences for and availability of substitutes, red meat, fish and poultry. Figures from the household expenditure survey carried out in Mali in 1989/1990 showed that for the country as a whole, the domestic consumption of beef, mutton and goat are the most important sources of meat (7.68 kg per head per year). This is also true of every individual region of the country, except Mopti and Timbuktu, where fish is more important. Overall, fish is a close second (6.00 kg). Poultry, even when "other poultry" (such as guinea fowl and ducks) are included (0.42 kg), is very much less important in the average Malian diet than either fish or red meat, though poultry is rapidly replacing fish in major urban markets as it becomes less expensive compared to fish.

As is generally the case, meat consumption per person is considerably higher in urban than in rural areas (12.63kg versus 5.81 kg (1989 household consumption survey)). In spite of this, a much larger rural population means that rural people as a group consume more red meat than the urban population (32,977 MT as against 27,140 MT). Bamako has both a large population and a high consumption of meat per person, making it by far the biggest urban market within Mali (9,697 tons), though total consumption in the regions of Kayes and Ségou is comfortably greater (13,074 and 10,976 tons) due to the larger total populations.

Consumer expenditure surveys indicate that the total demand for meat is expressed through market demand and is not simply a matter of subsistence (auto-consumption). For example, considerably more meat is bought than is produced from animals raised by households themselves (5.085 kg against 1.085 kg)<sup>4</sup>. This is true not only of urban but also of rural people who, in spite of their widespread tradition as herders, bought 3.6 kg and themselves produced just 1.2 kg of their meat consumption (household consumption survey, 1990)<sup>5</sup>.

As regards the influence of income, the consumption expenditure survey estimated income elasticity of demand for the main food items. Among meat sources, red meat had clearly the highest income elasticity of demand (1.36 in urban areas), with poultry second (0.98) and fish far behind (0.25). Thus, for every 10% increase in urban household income, the demand for red meat will, other things being equal, grow 13.6%, poultry demand will grow 9.8% and the demand for fish 2.5%.

The implication is that, as income grows, red meat will become an even more dominant item in Malian diets. What might not remain equal, and could at least reduce the rate at which the dominance of red meat grows, is the *price and production of poultry*. If the same pattern follows here as in other countries, and there is no reason to suppose it will not, poultry production will grow, and poultry prices will become more attractive relative to red meat simply because production efficiency is much more favorable for poultry. This would reduce, though likely not eliminate, the significant increase in red meat demand over time. Malians simply "like" red meat and are willing to continue buying red meat in the

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<sup>4</sup> Household Consumption Survey, 1989/1990. More recent data from an MSU study in 2011 showed similar overall trends.

<sup>5</sup> *ibid*

face of significant increases in price. In fact current red meat demand, in both domestic and export markets, is generally for unprocessed, un-chilled, and fresh meat. Although total demand decreased during the early 2000s, domestic demand remains strong today, with red meat prices in Bamako comparable to those in both Abidjan and Dakar markets.

The two major export markets for Malian cattle are Ivory Coast and Senegal. Among Mali's neighbors, Burkina Faso is a major livestock exporter and a serious competitor in the Ivory Coast market. The Ivory Coast is a major export market for Malian cattle and as such its characteristics are worth some attention, especially when compared to those of the Bamako market presented above.

Meat consumption data from the Ivory Coast (SODESI 1997) show that red meat is the preferred choice among the alternatives that include pork as well as chicken (fish is preferred, especially in poorer households). However, consumption per person of red meat decreased quite markedly, from 9.1 kg per person in 1980 to 7.2 kg in 1990, though it stabilized around 4.9 kg during recent years (mid-2000). Malian consumption per person may have fallen since the 1988/89 survey was taken, as many households may have been effectively priced out of the red meat market. But even so, *it seems clear that meat consumption per person in Ivory Coast is at least not greater than that in Mali, and could be significantly less, in spite of higher Ivorian personal incomes.*

The income elasticity for red meat in Ivory Coast is between 0.3 and 0.7, considerably below the figure quoted above for Mali<sup>6</sup>. If accurate, the interpretation of these figures is that for every 10% growth in personal income, demand for meat will grow from 3% to 7%. As in the case of Mali, increases in the supply of poultry, and declines in poultry prices, would likely reduce the rate of increase in red meat demand.

Indications<sup>7</sup> are that fish represents a more common substitute for red meat in Ivory Coast than in Mali and data suggest that the consumption of fish is, in general, increasing in Ivory Coast, especially among poorer urban households. The implication for Mali is that, if domestic incomes in both countries increase at about the same rate and if the elasticity estimates are roughly accurate, domestic demand for red meat will likely grow faster in Mali than in the Ivory Coast. In the face of recurrent problems in the export of live animals related to high and unmanageable logistical costs, poor coordination and the uneven application of UMEOA/CEDEAO trade legislation, Bamako could easily become the priority destination for domestically fattened cattle. Presently a major disadvantage of the Bamako market is that the majority of transactions are made on credit, while in export markets transactions often in cash<sup>8</sup>.

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<sup>6</sup> Bernard Kouassi, "Analyse multidimensionnelle de la consommation urbaine de boeuf en Côte d'Ivoire", publication unknown. This study, which produced estimates of 0.27 and 0.71, cites another (on p. 79) which arrives at an elasticity of 0.55; Kenneth H. Shapiro, "The Livestock Economies of Central West Africa: An Overview", in *Livestock Production and Marketing in the Entente States of West Africa*. Summary Report, CRED, Ann Arbor 1979, p. 56. As Kouassi points out, he had to omit from the independent variables the prices of substitute meats. This could have resulted in biased estimates of the variables he did include, income among them. Fidele Sarassoro, USAID/WCA Redso economist, found an income elasticity of 0.68 ("Report on Mali Cattle Export to Côte d'Ivoire", memo to Vic Duarte, USAID, June 25, 1990) though there were difficulties with the econometrics here too.

<sup>7</sup> Source: Direction de la Production Animale, RCI. Cité in de Troyes, et al. Evaluation des possibilités de mise en place d'une filière de la viande malienne en Cote d'Ivoire, SODESI, March 1997.

<sup>8</sup> Note footnote 17 on page 12 related to butcher indebtedness at Port-Bouet slaughter house in Abidjan

In Mali, with real income per person growing at a rate of from 0.5% to 1.0% annually after correcting for inflation, growth in the demand for red meat can be expected to be from 0.7% to 1.4% per person. With population growing at around 3.0% annually, total demand will grow in the region of 2.1% to 4.2% per year. In fact, Metzel et al concluded in 1998 that if production and consumption trends continue, in ten years Mali could in fact outstrip its capacity to export significant numbers of live animals, focusing instead on satisfying domestic demand. The fact is that trends did not continue and Mali suffered political, social and economic shocks in 2010, just as the Ivory Coast was emerging from post-election chaos. But this scenario remains possible since recent data suggests<sup>9</sup> that meat consumption in Mali is almost twice that of Ivory Coast (22.2 kg/capita compared to 13.1 kg/capita). It is evident that incomes during the past 4-5 years have not kept pace with predictions, but the high risks associated with live animal exports make Bamako a good alternative. The problem is that volumes are limited.

This historical context of the evolution of Mali's cattle/red meat sector provides indications for the future. If Mali is to continue to be a dominant regional exporter of cattle, productivity in cattle rearing systems must increase and off take needs to increase and be better linked to market demand, while commercialization must become more formal (contractual) to encourage investment. Unfortunately, offtake does appear to be increasing in some major production zones in northwestern Mali, and possibly elsewhere, but not as a result of market forces, rather the negative impacts of climate change.

Recent evidence<sup>10</sup> would suggest that offtake is increasing from traditional levels of 12-14%, not in response to market demand, but rather in response to the effects of climate change on rainfall patterns. During the past 2-3 years there appears to be a progressive reduction in total rainfall in traditional migratory pasture areas in the northwest part of Mali. Consequently, producers have been obliged to sell increasing numbers of animals, including in some instances lactating, pregnant females with calves. (In fact, such animal cohorts were observed during recent field trips associated with the elaboration of this report). This phenomenon requires further study and verification to assess its distribution and impact on traditional cattle production systems. But it is clear that under certain conditions the loss of traditional pasture areas is destabilizing production systems and undermining Mali's future comparative advantage in both domestic and regional export markets, as well as compromising national food security efforts.

In summary, while the future demand for red meat will surely increase due to increased population growth, urbanization and very modest increases in most urban household income, supplies to these markets face considerable constraints. Both domestic and export red meat markets have their unique risks and the targeting of terminal markets by cattle fatteners will be based on their ability and capacity to manage the risks associated with each. In Bamako, these are related to butcher indebtedness and the resulting need for credit-based transactions, as well as the "control" of market prices by a few well-placed individual cattle traders, who because of their market power are essentially able to determine cattle prices. In the case of export markets, major risks are associated with high and uncertain transport costs, as well as the limited ability to manage transactions in an export market environment and the inability to deal with rampant butcher indebtedness and non-payment of supplier credit. Moreover, in both cases, the commercial livestock sector poses considerable barriers to entry, greatly limiting potential competition and changes in operational mindsets in the short term. Changes in supply

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<sup>9</sup> FAOSTAT, 2013, *Current Worldwide Annual Meat Consumption per capita*.

<sup>10</sup> Discussions with several major livestock fatteners/exporters in Segou during a rapid assessment focused on improving the competitiveness of the Mali's cattle export value chain, R. Cook, 2015.

chain governance will be necessary to successfully implement systemic structural changes in the sector to mitigate these risks and ensure that supply chain operators are capable to responding to the evolving market requirements both domestically and regionally.

Another potentially important factor for Sahelian livestock supply chains is the present impact of climate change on viability of traditional production systems. While details of this phenomenon have only been alluded to in this report, it deserves increased attention. Improving regional food security and incomes through the promotion of regional trade requires not only a focus on improving the efficiency of cross-border commerce, but also on ensuring the sustainability of associated commodity supply chains. Fundamental in this regard is the development of increasingly resilient production system.

# 3. CAPACITY OF FEBEVIM TO SUPPLY FATTENED CATTLE FOR EXPORT

Members of FEBEVIM encountered during the course of the present assessment, as well as many others personally known by the consultant, have years of experience in cattle fattening and commercialization, particularly in the export of live animals, and some of these individuals represent second or third generation involvement in livestock commercialization. Many have their own representatives in each export market or are connected to local informal market information networks. Moreover, they understand the practical aspects of cattle fattening; balancing the constraints of formulating least-cost rations with available feed raw material supplies to ensure that animals gain sufficient weight within a specific period of time and at a time when prices in terminal markets are favorable.

## 3.1 FEEDLOT OPERATIONS

In general, Malian feedlot operators use two fattening periods, an early period during October-December and a late dry period from March-May. The early season is characterized by a 60/75-day feeding period, and since this period corresponds to the harvest period for rainfed cereals and rice harvests, crop by-products are more available and relatively less expensive than during the late rainy season. Also feeder cattle are in better shape and respond more quickly to intensive feeding than later in the year. During this period average feeder cattle weighing approximately 300 kg cost between 275,000-300,000 FCFA. With good daily gains of about 3 kg, after 60/75 days animals will weigh between 500 and 550 kg and sell in export markets for 500,000 – 550,000 FCFA. Average feed costs and veterinary services (vaccinations) are between 80,000 – 95,000 FCFA for the period, equal to 1,200 – 1350 FCFA/day. During this fattening period cattle prices are usually higher in major export markets than in Bamako.

During the second fattening period from March to May, feeder cattle weighing 275-300 kg will cost between 300,000 to 375,000 FCFA and following a 90-day feeding period will on average weigh between 500-600 kg and sell for 550,000 to 650,000 FCFA. Average daily gains during this fattening period are approximately 2.5 kg; total feed and veterinary costs average approximately 120,000/head/90-days or 1330 FCFA/day. During this fattening period Bamako market cattle prices compete favorably with those in Abidjan and Dakar due to shortage of supply because of the start of the rainy season and emerging new pasture result in a reduction of the off-take rate.

## 3.2 ANIMAL FEED MARKETS

Although the availability of composite feed raw materials have improved over the past decade as a result of an increase in the local processing of cereals and increased availability of cereal crop residues at harvest season, their overall availability remains limited in relation to demand and they are generally of poor quality and highly variable price making consistent access to animal feed resources one of the weakest link in the cattle export supply chain. Moreover, preserving national rangeland areas has become increasingly problematic with pastures suffering from climate change induced increasing rainfall

variations<sup>11</sup>. The result is that the continuous availability of quality forage and fodder year round is perhaps the major constraint limiting the production of quality livestock for regional markets.

Overall, the commercial animal feed industry remains fundamentally unstructured without effective quality control procedures, feed standards or certification processes. In fact, rations are seldom analyzed for their nutritional content or sold on a nutritional content basis. Commercial composite rations have generally targeted poultry producers, but commercial ruminant rations are increasingly available, though in many cases they are not nutritionally complete. Overall, the supply of quality commercial feed is insufficient in relation to demand. Due to the highly variable quality of many commercial feeds most commercial feedlot operators seldom use solely commercial rations. And because of the volatile seasonal prices of feed raw materials, feedlot operators often formulate their own rations using available feedstuffs based on their “experience” and not surprisingly their feed formulations generally work well, resulting in good daily costs per kg of gain.

A few companies produce the raw materials for manufacturing concentrate feed. Two major suppliers of wheat bran are flour millers Moulin du Sahel and Grands Moulins du Mali ((GMM). GMM is located in Koulikoro and produces around 7,000 metric tons of wheat bran annually<sup>12</sup>. The bran is then mixed with by-products from rice and wheat milling, and with added salt is sold as aliment bétail Achkar.

The major protein supplement used in feedlot operations is cotton seed cake, and production and access to producers remain problematic. First, the production levels of cake are effectively determined by cotton production and processing and not in response to demand from livestock producers; and secondly, access to cake is not through open and transparent market channels but rather through a quota system administered by CMDT, a para-statal structure responsible for the production and marketing of cotton, and major CMDT partners producing cottonseed oil. One such company producing cotton seedcake, as a by-product from oil production is HUICOMA and the quantity of seedcake they make available to producers has been decreasing in recent years due to lower cotton production. A decrease in availability has also resulted in increases in prices and presently the price of cottonseed cake containing approximately 38% crude protein has increased in price from 7,000 to 9,000 FCFA per MT, though unofficial prices may be considerably higher.

In addition to protein, high-energy content rations are necessary to efficiently fatten adult animals. To meet these energy requirements feedlot operators often use molasses, a by-product from sugar production. Molasses competes with ethanol production that is presently the preferred product and the price varies widely. During 2010 the price fluctuated between 10 FCFA/kg to over FCFA 25/kg because of erratic production resulting in highly variable and insufficient supplies to meet local demand.

Although the decline in cotton production in Sikasso Region has had a negative impact on cottonseed cake availability, this decrease has opened up opportunities to increase maize production for both human and livestock use, particularly poultry. Sikasso has become an important region for feed production with 65% of all land in maize<sup>13</sup>. Maize production was 395,000 MT during the 2007/2008-

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<sup>11</sup> In northwestern regions of Mali, traditional producers are increasingly selling pregnant cattle with calf, an unheard of practice, due to the lack of pasture resources. Personal communication, Segou, March 2015.

<sup>12</sup> Texas A&M University. “Livestock Assessment for Feed the Future Initiative – Mali and Four Coastal Markets of West Africa.” Prepared for USAID by The Borlaug Institute, College Station, Texas, June 2012

<sup>13</sup> Ibid

crop year in Sikasso, more than the combined production in all other regions. The region's average yield is 1.5 MT/ha, higher than the national average of 1.3 MT/ha. Agro-industrial by-products from maize milling are an important feed component for ruminant feeds.

Developing a modern animal feed industry will require establishment of regulatory measures to monitor the quality of major feed ingredients, technical assistance in the proper blending of feed rations, and the necessary training of livestock producers in the use of best feeding practices. Feed millers need to provide high quality feeds on a continual basis at competitive prices with less reliance on cottonseed cake to produce a balanced diet which uses no more than 20% to 30% cottonseed cake in the ration<sup>14</sup>. Moreover, cottonseed cake from poorly extracted cottonseed can result in cake with high oil levels and reduce feed intake due to rancidity and palatability problems and thereby reduce daily gains.

### 3.3 ORGANIZATION OF ANIMAL EXPORTS

Traditional exporters who understand and profit from the existing systems of governance and institutions have operated most livestock export supply chains for decades<sup>15</sup>. While these individuals ensure a deep understanding of how to “manage” frequently scarce supply chain resources within a traditional, informal business context, they also represent a potential constraint to modernizing or systemically changing supply chain structure and governance to a more open, transparent and inclusive system. In fact they may view systemic changes related to the governance of major supply chains as a gateway to the loss of power and influence in the marketplace.

Strategically FEBEVIM has a feedlot producers' network in five regions throughout Mali (Kayes, Koulikoro, Bamako, Segou and Sikasso comprising more than 15 well-experienced feedlot/export operators). A national coordinator based in Segou centralizes information on current and proposed future fattening and export activities of this “loose” network and as a result FEBEVIM is uniquely positioned in Mali to respond to sub-regional demands for live animals.

Under present conditions FEBEVIM is well placed to continue exporting cattle to sub-regional markets as they have in the past. However, will their present structure be able to respond to the increasing demand for beef in coastal markets in the future? Increasing the volume of quality animals exported to coastal markets will be essential for both the continued viability of Mali's livestock sector, as well as to meet the export market demand. However, a major constraint that has limited the capacity of feedlot owners to increase the number of fattened animals is access to credit. During the 1990s, several credit schemes to promote cattle fattening, called “embouche paysanne”, were initiated by donors and several commercial banks. Unfortunately the very low repayment rate for both project and institutional loans was very low resulting in the eventual cancellation of such schemes. Presently, feedlot operators themselves, occasionally supported by informal networks, finance the vast majority of fattening activities. Institutional credit is virtually non-existent.

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<sup>14</sup> Ibid

<sup>15</sup> Institutions in this case refer to *formal* rules and codified laws, or *informal* such as political, social and cultural norms. In settings where formal institutions (e.g. the rule of law, elections, separation of powers) are weakly embedded and enforced, informal norms often explain how things really get done. In many developing countries, there are tensions between formal rules and informal power relations, sometimes making politics unpredictable and prone to conflict, DFID, Political Economy, July 2009.

One approach towards addressing this situation is to work with feedlot operators to better structure their activities. As pointed out repeatedly in this document, traditional cattle fattening and export supply chains are fraught with risks, especially at the export phase. In this regard, the major risk is securing payments from butchers in large urban slaughterhouses. Sales under these circumstances are generally on a credit basis, but there is no legal document that assigns responsibility for either the delivery of animals that meet certain criteria (age, weight, conformation, breed, health, etc.) or the modalities of payment (cash, credit – percentage at sale, balance in a specific period). Given the well-known indebtedness of urban butchers, it is virtually impossible to manage the risk, particularly in the case of export animal sales (also a problem with local markets, but proximity in this case facilitates resolving disputes).

Contracting for animal sales with credible and financially secure enterprises is a key to resolving this problem, both up- and down-stream. Down-stream formal contracting eliminates many of the risks presently associated with traditional sales' practices. In the case of a delivery contract between FEBEVIM and PROSUMA, live cattle would be purchased by PROSUMA according to the conditions stipulated in the contract and butchers would be engaged by PROSUMA for slaughter. There would be no formal or informal arrangements between FEBEVIM and local butchers in Port-Bouet. Up-stream, FEBEVIM exporters would have a supply contract that stipulates numbers and prices for exported animals. This document could provide the basic commercial context for developing a succinct and well-focused business plan. This would be a first step for FEBEVIM to begin engaging a financial partner (formal financial institution) and negotiate a line of credit to finance animal purchase, feeding and export costs directly related to the sales agreement. Without financial partners it is difficult to imagine how live animal exports will reach the volume of sales necessary to promote future investments in infrastructure and technologic innovations to ensure that these supply chains in the future can respond competitively to large, evolving coastal West African urban markets.



## 4. PROSUMA AND ABIDJAN RED MEAT MARKET DEMAND

The Abidjan meat market is increasingly being supplied by local outsourcing for virtually all types of animal-based products, a change from the past when meat products were primarily outsourced from overseas suppliers (Europe, Brazil, Argentina, South Africa). Major extra-African imports presently involve poultry and fish, though at levels 10% of those seen in the mid-2000s. Red meat imports have been dramatically decreasing to low levels for the past 3-4 years<sup>16</sup>.

As noted by Holtzman et al<sup>17</sup> urbanization has increased at a rapid pace in West Africa, resulting in an increase in the urban demand for red meat and other forms of animal protein. Per capita incomes have also increased for certain segments of the population, supporting a rising middle class of consumers with disposable income and preferences for higher-quality meat and meat products. Upscale, supermarket red meat demand is highly segmented and volumes small when compared with the majority of urban sales that take place in open markets, where beef with bone is the common purchase. This reflects the fact that the majority of urban consumers have limited incomes and price remains a major determinant in purchasing meat products.

In traditional livestock trade, the principal coastal buyers are wholesale butchers who obtain slaughter cattle on short-term credit, and who often share ethnic and family ties/relationships with Sahelian cattle exporters. These wholesale butchers sell carcasses to retail butchers, but may choose to retail some cuts of beef themselves. Evidence indicates<sup>18</sup> that these wholesale butchers have become increasingly insolvent and increasingly incapable of ensuring financially viable transactions, a major operational risk in the traditional animal supply chain.

Traditional livestock supply chains routinely depend on supplier credit and the indebtedness and non-payment of supplier credit have become increasingly problematic. Wholesale butchers in large urban markets are the most indebted group, as illustrated above, and as their debts accumulated, exporters supplying coastal markets have become increasingly aware of the risks of supplying butchers with live animals on credit. This situation constrains supply at the margin and tends to push up livestock and red meat prices, which could discourage red meat purchases and consumption at the margin<sup>19</sup>. Given the problems of indebtedness and lack of credit-worthiness among coastal buyers, cattle-fattening enterprises may have better opportunities by seeking out buyers in large coastal markets with greater liquidity and a reliable capacity to buy significant volumes of fattened cattle with their own financial resources<sup>20</sup>.

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<sup>16</sup> United Nations Commodity Trade Statistics Database (COMTRADE)

<sup>17</sup> Holtzman, John S., Seydou Sidibé, and Sarah Kozyn. "Opportunities for Increasing Livestock Trade in the Mali-Côte d'Ivoire Corridor." Prepared for the Trade Hub and African Partners Network by Abt Associates Inc., Bethesda, MD. February 2015.

<sup>18</sup> During the past six months it is alleged that wholesale butchers in the Port-Bouet slaughterhouse have absconded with more than 600 million FCFA in commercial receipts from livestock sales.

<sup>19</sup> Reference 7.

<sup>20</sup> Ibid.

A promising class of buyers for purchasing fattened cattle from the Sahel is supermarket chains and large-volume food import and distribution companies such as PROSUMA in Abidjan. In the Abidjan red meat market, upscale market segments are dominated by the PROSUMA Group that presently represent over 350 retail clients, including most major supermarkets. During the past year, PROSUMA has sold more than 1,000 MT of animal based products<sup>21</sup>. Included in these sales are approximately 600 MT of red meat-based products, including processed meats, all outsourced locally. These figures indicate that locally outsourced beef represents the basis of PROSUMA's sales for red meat products and strengthens their argument to focus on developing a commercial policy of “equitable commerce” with local producers as the most viable way to strengthen and grow their local commodity supply chains. Moreover, such a policy strengthens the operational context to encourage local producers like FEBEVIM (COFENAVI-AO and others) to be proactive in developing commercial partnerships with PROSUMA. The fact that PROSUMA has focused its red meat supply chain on local outsourcing also supports the idea that high-quality Sahelian beef can compete well on price and quality with high-end cuts of imported beef from non-African sources for upper- and upper-middle- class consumers in other large coastal cities (Dakar, Accra, Lagos).

From estimates of the importation of live animals into Cote d'Ivoire during the first 11 months of 2014 that totaled 57,733 cattle<sup>22</sup> it is clear that PROSUMA is a major player in the red meat market. With annual sales of about 600 MT of red meat products, all from locally outsourced live animals, their market share of the cattle red meat trade appears to be approximately 5%. Sheep sales, on the other hand, are generally not undertaken in the same context as cattle. The vast majority of sheep exported to Abidjan markets target major Muslim holidays and as a result commercial transactions are based on live animal sales, not commercial slaughter, enabling households to follow traditional religious practices.

The present dialogue and negotiations with PROSUMA are key in enabling and encouraging FEBEVIM to begin the process of formalizing commercial sales as a major step in re-structuring its present “business model”. It is also apparent that the majority of commercial transactions in the red meat sector do not involve PROSUMA, also indicating that there may be many other opportunities to create formal partnerships to penetrate Abidjan's red meat market which merit further evaluation by FEBEVIM.

To date, PROSUMA has requested that FEBEVIM provide them with an offer for the export of three categories of cattle: 200 – 250 kg, 400 kg, and 500 kg. FEBEVIM has responded with regards to 400-500 kg cattle. Although some feedlot operators export young bulls of 2-3 years of age, it is not a regular practice and generally reserved for the Ramadan holiday when families slaughter these animals. Several FEBEVIM feedlot operators in the Segou network will have well fattened younger animals ready for the coastal holiday markets, but not for PROSUMA at this time. Holiday prices for these animals are very attractive and were not considered for PROSUMA test shipment.

PROSUMA responded to FEBEVIM's proposal stating that they also would like quotes for 25-35 kg sheep. FEBEVIM did not initially respond to PROSUMA's request for the supply of 25-35 kg sheep, but when requested to do so a second time by PROSUMA, decided to examine the request.

The problem is that PROSUMA's request for small ruminants falls outside the traditional market targeted by FEBEVIM members. First, as a general rule sheep fattening is intended to provide finished

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<sup>21</sup> Mr. Dominique Lannes, Meat Product Supply Chain manager, PROSUMA. Personal communication, March, 2015

<sup>22</sup> Reference 7, and Government of Cote d'Ivoire

sheep at more than twice the weight requested by PROSUMA and represent sheep in the range of those purchased by feedlot operators for fattening. Secondly, sheep fattening targets the Muslim holidays of Ramadan and Tabaski. During this period the very high price for Malian fattened Bali-bali breeds, especially in the Dakar and Abidjan open markets would likely be considerably higher than the prices offered by PROSUMA, though as noted above negotiations continue. Under present conditions there is little incentive for feedlot operators to target the market proposed by PROSUMA during the pre-holiday fattening period, since the holiday live sheep markets for live animals are by far the most profitable, especially in Dakar.

## 5. FEBEVIM MARKETING AND FATTENING PLAN 2015

FEBEVIM's domestic regional networks are responsible for developing and planning feedlot-export activities, as illustrated in Table I below. In general, export planning for adult (5-7 year old) cattle are determined by available financing (most activities are financed by feedlot operators themselves), market price of feeder cattle (generally lowest during the early and mid-dry season) and available feed resources. This class of exported animal is not initially targeted for a specific terminal market, operators preferring to wait and assess prevailing market prices before exporting. In many cases the Bamako market offers an alternative by offering competitive live animal prices without many of the risks associated with export to major sub-regional coastal terminal markets.

**Table I: FEBEVIM Draft Fattening Plan for 2015**

<b>Feedlot Network Coordinator</b>	<b>Region</b>	<b>Number of Cattle (450-550+ kg)</b>	<b>Period of Year 2015</b>
Dramane Diarra	Segou	540 head	Throughout the year
Alkaou Toure	Kayes	80 head	Throughout the year
Mme Tamboura Mah Keita	Koulikoro	3190 head	Throughout the year
Mme Sagara Saran Bouare	Bamako	570 head	Throughout the year
<b>TOTAL</b>		<b>4380 head</b>	<b>“</b>

In the case of small ruminants and young (2-3 year olds) bulls, exports are targeted to major Muslim holidays of Ramadan and Tabaski (Eid al-Fitr). In this regard, young well-finish bulls bring premium prices at the end of Ramadan, especially in Abidjan, and to a lesser extent in Dakar. Sheep fattening target the Tabaski (Eid-al-Fitr) holiday, and the Dakar market is especially attractive due to traditionally high prices offered for the large Sahelian “Bali-Bali” which is the major breed exported from Mali. It is also important to note that sales targeted to Muslim holidays, especially Tabaski, are live animal final sales, where individual families sacrifice animals according to customary religious practices. Sheep exports do occur throughout the year, but fattening efforts are much less intense than during the build-up to the holiday market season because of relatively lower market prices during the non-holiday periods, but it should be noted that households sacrifice sheep throughout the year for marriages, births, etc.

The specific nature of holiday market demand limits the attractiveness of alternative, carcass-based, market opportunities. For example, in the present case of developing a contractual agreement between FEBEVIM and PROSUMA, PROSUMA's request for light weight (25-35 kg) sheep may not be commercially interesting if such activities compete for feedlot operator resources during the pre-religious holiday season scale-up period. The religious holidays are an opportunity for many feedlot

operators, large and small, to generate significant revenues domestically, as well as through exports due to the exceptionally high prices for quality animals. It should also be remembered that feedlot operators themselves finance the vast majority of feedlot activities, limiting both their scale and scope.

Initially PROSUMA has indicated<sup>23</sup> that they want to contract for approximately 50 cattle per week, approximately 200 animals per month, 2,400 per year. It is clear that FEBEVIM regional networks are well positioned to supply this number of animals. They already have more than 4,000 head (note Table I) fattened cattle ready for export. However, during the rainy season, and for several months thereafter, the number of market animals decrease due to the presence of adequate pasture, and as a consequence market prices increase. The variation in the seasonal availability of animals and in market prices would have to be “built into” any long-term contractual agreement.

On a final note, FEBEVIM’s technical expertise in feedlot operations and export presently position them as a key partner for Trade Hub export livestock supply chain activities focused on sub-regional coastal markets not only in Mali, but also as a partner in building cross-border organizations, coalitions and business enterprises. The geographic distribution of their networks within Mali and the professional relations FEBEVIM members have developed over the years with key input market operators strengthen their collective capacity to lead and support innovative changes in supply chain structure and governance. However, as noted previously, FEBEVIM membership’s traditionally strong, sometimes even dominance in the marketplace and in livestock fattening and commercialization may result in a reluctance to commit to and lead systemic changes in the present system to make it more open, transparent, and business structured in order to become a major economic force for sub-regional economic development. Trade Hub needs to work closely with FEBEVIM management to identify the potential “movers and shakers” that could initiate lead and change within both the organization and supply chain.

Accordingly, FEBEVIM needs support and guidance to identify among its membership a small group of progressive, visionary and committed individuals to develop new business models for the feedlot-export supply chain. Such business models over time need to evaluate and consider evolving into multi-national supply chain enterprises capable of more efficiently utilizing the complementary agricultural and livestock resource base of neighboring countries in the sub-region to achieve the economies of scale necessary for promoting investment to ensure competitiveness over the medium and long term.

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<sup>23</sup> Personal communication with Dr. Seydou Sidibé regarding his first meeting with Mr. Lannes, PROSUMA

## 6. CONCLUSIONS AND RECOMMENDATIONS

- FEBEVIM is a credible, committed and important partner in Trade Hub's livestock value chain program. However, to capitalize on this potential, Trade Hub needs to work more closely with FEBEVIM to develop and support efforts focused on strengthening business development and management capacity. The key word in this regard is "empowerment". Such efforts should be undertaken within a strategic framework that develops general association business management capacity, but that also focus on a small group of FEBEVIM members committed to developing a new, innovative business model for more efficiently and competitively structuring and managing livestock export supply. This model could use a sales agreement with PROSUMA to initially develop a business plan to create a supply chain management business, perhaps cooperative in nature and open to possible future regional partners. The group of FEBEVIM members should be small initially and focused on one or two export markets where the group can clearly demonstrate a comparative advantage (such as Abidjan and Dakar).
- Trade Hub should assist FEBEVIM targeted membership directly involved in the PROSUMA contract to develop a new business model, as noted above. This effort should result in the development of a realistic business plan that can evolve over time as market opportunities expand and diversify. The starting point should focus on strengthening the capacity of this small group of selected FEBEVIM membership to undertake simple market surveys. The objective of this support should be two-fold: (1) target 1-2 major export markets (identified in collaboration with FEBEVIM) where surveys should focus on, for example: (1) a general overview of targeted market (size, prices, types of products, trends); (2) market structure (major segmentation); and (3) identifying possible commercial partners. Such efforts should lead to formalizing one or more partnerships similar to that being undertaken with PROSUMA. Trade Hub support should include, but not necessarily be limited to, the participation of in-country technical support staff (possibly Trade Hub business development/financial facilitators<sup>24</sup>).
- FEBEVIM, and especially those members directly involved in the PROSUMA partnership, will require knowledgeable assistance from a business/jurist/contract specialist when drawing up and finalizing their contract with PROSUMA. In all likelihood PROSUMA has a standard supply contract format that they may insist upon, in which case FEBEVIM members will need guidance and counsel as to the implications and responsibilities they assume when signing such a document. During this early period of structuring their export sales, they may also require the assistance of such an expert on repeated occasions until they are able to develop basic legal knowhow to be able to understand the legal implications and associated risks of different contractual mechanisms and specific contract provisions. As contracts become increasingly important from a financial standpoint, Trade Hub should be guiding FEBEVIM on possible measures to manage contract risk like insurance, on-site legal advisors in major terminal export markets, contracting for transport where transport companies are able to assume some of the

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<sup>24</sup> During the visit to Abidjan discussions were held with Emanuel Diakite and Guillaume Liby, both Trade Hub business development and financial facilitators. Emanuel demonstrate real insight into the Abidjan market and could serve as a technical support person for a FEBEVIM market survey mission.

risk due to their position in the sector and knowledge of UEMOA/CEDEAO transport rules and regulations. Such support measures need to be provided on a phased-in basis, as financial risk begins to warrant/justify additional contract management costs.

- Trade Hub needs to begin discussing with and assisting FEBEVIM membership to develop new business models that will enable FEBEVIM investors to adjust to the additional risks associated with large volume export transactions. One such model that might be explored is the creation of multi-national (example: Mali, Burkina, Cote d'Ivoire), cooperative-type businesses that have activities in multiple countries focused on developing and managing well-structured commodity supply chains for live animal exports to Cote d'Ivoire. Such an effort was apparently started in 2012 by COFENABVI-AO<sup>25</sup>, but was not successful, apparently due to poor overall management. This effort needs to be examined closely to fully understand why it failed. (Note here the need to begin thinking in terms of multi-national efforts that will more efficiently and effectively use the complementary agricultural and livestock resource base of neighboring countries in the sub-region for mutual benefit.)
- Trade Hub might also assess the possible impact of including new sub-regional markets for Malian livestock that are being developed by FEBEVIM (Guinea, Gambia) on overall program impact and indicators.

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<sup>25</sup> Personal communication with Roger Boni, Abidjan, March 2015

# ANNEX A: TERMS OF REFERENCE

**Support to Implementation of the Livestock Value Chain Work Program  
February – March 2015  
Provided by a Senior Livestock Consultant**

## INTRODUCTION

USAID/West Africa's Mission-wide goal is the West-African led advancement of social and economic well-being. This goal is supported by several development objectives, including "broad-based economic growth and resilience advanced through West African partners." The Trade Hub and African Partners' Network Project (the "Trade Hub") will contribute to this development objective by achieving two critical intermediate results:

1. Improving the capacity of West Africa's farmers and firms in targeted regional and global value chains.
2. Improving the business enabling environment by addressing transport constraints and trade barriers affecting the efficiency of the region's corridors and borders.

The Trade Hub will work through regional private sector associations and regional governmental entities to help channel all partners' efforts in a way that will address critical constraints to trade competitiveness, capture opportunities to expand trade, demonstrate West Africa's productive potential to investors, and facilitate greater investment in the region. Its results will include both an increase in 1) regional trade in key agricultural commodities, a critical Feed the Future (FTF) indicator, and in 2) value-added global exports, a targeted indicator for the Africa Competitiveness and Trade Expansion (ACTE) Initiative, which ultimately aims to increase Africa's share of world trade.

The project will build the capacity of several key groups of African partners—regional private sector associations and alliances, the Economic Community of West African States (ECOWAS), the Economic and Monetary Union of West Africa (UEMOA), a multi-donor funded Transport and Facilitation Observatory, and Global Development Alliances with private sector companies. As the Trade Hub works with associations and regional alliances, it will help them serve as leaders in promoting reforms, attracting buyers and investors, and adopting improved practices. Eventually, the Trade Hub's partners will act independently and take on even greater leadership roles.

The Trade Hub's major components are:

- Regional staple foods development (livestock and grains)
- Global value chain development (targeted agro-processing and manufactured consumer goods)
- Finance and investment
- Transport and the trade enabling environment (TTEE)
- Capacity building
- Communications
- Administration and management, including grants administration



## CONTEXT FOR THIS ASSIGNMENT

The recently completed Bamako-Abidjan corridor livestock trade study recommends that the livestock VC work focus on improving and expanding cattle fattening, as well as continued work on livestock trade facilitation (removal of non-tariff barriers and unnecessary ‘taxes’). Other THN components will work to strengthen the capacity of the regional livestock umbrella organization, COFENABVI, and to build improved livestock market information systems in West Africa, particularly in the central corridor.

The following individuals have been collaborating on this work:

- VC team leader
- Livestock specialist
- Short-term agribusiness advisor from Abt Home Office
- Regional organizations specialist
- Finance and investment component lead
- MIS specialist

This assignment will focus primarily on further exploring the feasibility of linking livestock fatteners, initially grouped together under FEBEVIM, to coastal West African buyers. The tasks will be to:

- Verify that the FEBEVIM cattle fatteners are able to supply a steady stream of fattened cattle, month by month, over the entire year. If there are constraints to doing this, identify them.
- Work with the FEBEVIM cattle fatteners to develop a fattening plan that will produce at least 50 head per month (two truckloads) of fattened cattle to ship to PROSUMA (or other buyers) in Abidjan.
- Prepare specific information to PROSUMA on what Malian cattle fatteners are able to supply (send pictures of characteristic types of fattened cattle) and for which delivery periods.
- Provide assistance in negotiating a contract with PROSUMA.

The main deliverables from this assignment will be:

- A report that summarizes findings and field observations from working with Malian cattle fatteners, and guidance as to next steps.
- A livestock trade contract between a group of Sahelian suppliers (cattle fatteners) and PROSUMA, or significant progress toward such a contract.

## OBJECTIVES

### I. GENERAL OBJECTIVE

The general objective of the livestock value chain program is to identify and prioritize opportunities for increasing regional livestock trade to the targeted amounts below:

Value chains	Baseline trade along CILSS monitored corridors	Target (= baseline value plus 50%)	Increase needed
Cattle	\$140 million	\$210 million	\$70 million
Small ruminants	\$41 million	\$62 million	\$21 million

This assignment will focus on the Mali to Côte d'Ivoire corridor and attempt to structure an ongoing trade deal. If no deal can be struck with PROSUMA, the consultant will suggest other possible buyers in Côte d'Ivoire (and Senegal).

## 2. SPECIFIC TASKS

Specific tasks that will contribute to the general objective are:

- **Assess Malian Capacity to Supply Fattened Cattle.** The work with the cattle fatteners of FEBEVIM (in Mali) should more fully enumerate which members (and any non-members) would be willing to collaborate in a year-round supply scheme.
- Obtain better information about their production costs (especially feed), marketing costs, and returns.
- **Specify Livestock Feed Sources, Costs, and Availability in Mali.** In obtaining better information about production costs, the consultant will identify current sources of livestock feed and estimate volumes available by type and prices.
- **Prioritize technical assistance, market identification, contract structuring, and animal production practice needs** for cattle fattening enterprises. What additional support could or should THN be providing and in what sequence?
- **Develop a contract template for cattle fattening enterprises** to use in their negotiations with buyers in coastal markets. Promote coordinated shipments, month by month, and assist FEBEVIM cattle fatteners to develop a well-defined delivery plan.

## EXPECTED RESULTS OR DELIVERABLES

The expected result is a document with three sections that include:

- A report summarizing findings of site visits to and interviews with cattle fattening enterprises in Mali. The report will include information about fattening costs and returns (and estimates of numbers of cattle being produced in 2015 or planned for production in future fattening cycles).
- A marketing plan for a well-defined group of fattening enterprises.
- Substantial progress toward crafting a contract with PROSUMA. If this opportunity does not materialize, suggest other large-volume buyers in Abidjan (or elsewhere).

## CONSULTANCY IMPLEMENTATION PLAN

The work will be carried out by a combination of project staff, the senior livestock consultant, and a senior agribusiness advisor in phases:

- **Follow-up to cattle fattening workshop.** Visit FEBEVIM and cattle fattening enterprises in/near Bamako, Koulikoro and Segou to observe selected operations, interview managers, and learn more about their costs and returns, as well as their capacity and willingness to supply fattened cattle in 2015. (February 25-28)
- **Write up findings of this field work,** detailing capacity to supply fattened cattle by enterprise visited, as well as costs/returns. (March 2-4)
- Based on this input, **prepare a coordinated fattening plan** for supplying cattle to coastal buyers, and vet with FEBEVIM fattening enterprises willing to participate. (March –following my return from Abidjan with FEBEVIM representatives, see below)
- Contact PROSUMA and offer a delivery plan with specifications (types/weights of cattle; delivery periods; transport arrangements). If agreement is reached, draw up a draft contract for FEBEVIM fatteners (March 5-7)
- Preparation for meeting with FEBEVIM, finalizing results from Abidan visit (March 9-10)
- Meeting with FEBEVIM representatives in Bamako to discuss meeting with PROSUMA, potential contract requirements (other possible upscale/volume clients and resulting organizational/planning needs including a coordinated fattening plan (March 11)
- Finalize report and submit (March 12-14) and respond to THN comments (1 day later in March).

#### Planned travel for the senior livestock consultant (16 days)

Travel	Date
Bamako to Koulikoro, Segou	February 25-28
Bamako and Abidjan	March 2-13; three days in Abidjan to meet with PROSUMA

- Total Level of Effort of 17 including 1 day for response to THN comments billable days.
- **Reporting Relationships.** The consultant will report to the VC team leader who will have primary responsibility for coordination of all inputs, review of the draft report, and presentation to the COP for final review before submission to USAID. The Livestock Value Chain Specialist will provide remote supervision.

# ANNEX B: LIST OF PEOPLE INTERVIEWED

Individual	Position	Telephone
Boubacar Ba	President FEBEVIM	66 95 21 99
Moussa Coulibaly	General Secretary FEBEVIM	77 35 99 51
Rene Alphonse	Member of FEBEVIM	76 11 81 54
Baya Bassoum	Member of FEBEVIM	65 50 50 50
Mme. Saran Bouare	Bamako Network Coordinator FEBEVIM	76 36 57 08
Dramane Diarra	Segou/National Network Coordinator FEBEVIM	76 43 26 70
Aboubacrine Kelly	Sikasso Network Coordinator	76 18 36 70
Dominique Lannes	Meat Product Supply Chain Manager PROSUMA dlannes@prosuma.ci	(225) 21 25 34 16; cell 07 01 32 45
Roger Boni	COFENABVI-AO	(225) 57 40 20 86
Emmanuel Diabate	Bus./Fin. Facilitators Trade Hub	(225) 07 37 68 98
Guillaume Liby		(225) 07 19 74 19
Salif Coulibaly	Vice President COFENABVI	(225)05 18 18 21
Seydou Sidibé	Livestock Value Chain Coordinator, Trade Hub	+226 78 33 88 52
John Holtzman	Economist/Ag Bus. Advisor, Abt Assoc.	301 347 5871
Bill Noble	Vale Chain Dev. Specialist, Trade Hub	(233) 0 262 800 781
Malick Lompo	Senior Mkt. Info. Specialist, Trade Hub	(233) (0) 262 800 792

# ANNEX C: TEMPLATE FOR MARKET STUDY AND MARKETING PLAN (ENGLISH)

## MARKET STUDY

### I. INTRODUCTION

#### I.1. Objective

This report contains the results of a market study conducted by [MARKETING FIRM] and designed to identify the general characteristics and sizes of, and trends within, the markets for [PRODUCTS/SERVICES]. These markets include those that relate to [SPECIFY]. In particular, the study sought to characterize and quantify trends that are relevant to [COMPANY]'s [PRODUCTS/SERVICES], as well as those that relate to associated subsectors of the consumer [MARKETS]. The survey is keyed on the [NUMBER] primary markets for [COMPANY]'s solution – [COUNTRIES] – but also includes limited information for other regions of the world.

#### I.2. Approach and Methodology

For this task, [MARKETING FIRM] compiled and analyzed relevant market and technology application information from a broad range of information sources that are known to be applicable for the task objectives. These sources include numerous market research and industry-specific databases accessible through commercial gateways, or "portals," as well as some that are accessible through the Internet. The specific sources included databases developed by over a dozen respected global market research firms (for example, [NAMES]), in addition to numerous trade-, industry- and technology-specific sources. For this task, [MARKETING FIRM] expects to compile pertinent information extracts from numerous published and unpublished reports for subsequent analysis.

[MARKETING FIRM]'s strategy has involved:

1. Developing search strategies that yield general market information and specific data elements relative to [MARKETS] in general, as well as to [COMPANY]'s business model;
2. Converting these strategies to Boolean or other search command statements applicable to specific information sources;
3. Implementing the searches within the applicable databases;
4. Filtering and organizing the obtained information in a manner consistent with its end use;
5. Reconciling the differences in related data elements from the different sources;
6. Analyzing the resulting information relative to the study objective; and

7. Presenting the resulting analytical output in a concise manner that is most informative to the client and potential investors.

### **1.3. The Team**

This study is the result of collaboration and combination of [NAME] and [NAME]'s expertise and knowledge. The team members' detailed bios are attached to this document for reference.

## **2. EXECUTIVE SUMMARY**

In [MONTH, YEAR], [MARKETING FIRM] conducted an extensive market research study to determine [DESCRIBE]. The study was designed to address [NUMBER] key questions:

- Who is the target market?
- How big in terms of potential revenues is the target market?
- What are the major distribution channels?
- Which products/services do potential clients want?
- How likely would potential clients be to buy these products/services?
- How much will potential clients be likely to pay for products/services?
- Who are the main competitors?
- Are there barriers to market entry?
- Does [COMPANY] have a competitive advantage?

This executive summary will address each of these questions. Following the summary, detailed findings for each survey question are presented in tabular format.

### **2.1. Major Points**

Overall reaction to the [PRODUCT/SERVICE] was very high, with nearly [%] of the respondents indicating that they would be "extremely likely" to use it; an additional [%] reported that they would be "very likely." While these interest levels were measured before discussing pricing of the product/service, they do reflect a high overall interest level.

The size of the markets for [PRODUCTS/SERVICES] is both difficult to quantify and to forecast. By all estimates, however, the component markets are substantial now and are expected to grow exponentially in the next few years into billions of dollars. For [COUNTRY], estimates of the market for [PRODUCTS/SERVICES] ranges from about [AMOUNT] to [AMOUNT] this year, growing to [AMOUNT] by [YEAR]. The [COUNTRY] market is estimated at about [AMOUNT] this year and growing to as much as [AMOUNT] in [YEAR].

[COMPANY]'s [PRODUCTS/SERVICES] appear to be particularly well-suited to address this market need. The [IDENTIFY POTENTIAL CLIENTS AND PARTNERS] all represent good candidates for profitable relationships.

The enterprise market segment – with its proven successful business models – represents another potentially lucrative opportunity for companies that can effectively and efficiently facilitate [DESCRIBE].

[COMPANY]'s solutions also appear to be particularly well-suited to address this large market segment. Another category of potential customers is represented by [IDENTIFY] who have yet to [DESCRIBE].

### **3. PROBLEM DEFINITION**

In a world where customers make the rules, the organization of information and knowledge has become the prime mover in creating competitive advantage. Since we have entered into the information age, market power has been rapidly shifting from sellers to buyers. Nevertheless, there is still a lot to do regarding the management of customer relationships in order to fulfill the widening chasm that separates customers and marketers. Part of the solution may be to stop to sell, and to empower customers to buy...

No one ever said consumerism was easy. At one end, the poor consumer faces a bewildering array of goods and services. On the other, vendors contend with a diverse and fragmented marketplace that makes finding the right set of customers akin to finding the proverbial needle in the haystack. And in between are the billions misspent on muffed purchases and broken marketing campaigns that serve only to stuff mailboxes and alienate the very customers that vendors are trying to attract. The advent of the Internet has only intensified the problem by offering consumers even greater choice, vendors more competition, and new communication means to advertisers – which is just more exasperating consumers!

More specifically, the market study addresses:

[DESCRIBE]

The problem definition must state that sufficient potential demand exists for [COMPANY]'s [PRODUCTS/SERVICES] as proposed.

### **4. MARKET SIZE AND TRENDS**

#### *Target Market Area Definition*

The target market (TM) is defined as [DESCRIBE]. The analysis must describe and justify the basis for defining the boundaries of the TM. Use of complete demographic and geographical factors is definitely encouraged. Secondary market areas may be delineated as a subset of the entire market, though the study must include the basis for considering the secondary market.

### **5. INDUSTRY OVERVIEW AND CHARACTERISTICS**

Early technical and market developments as well as initial user reactions already indicate that [PRODUCTS/SERVICES] has a significant role to play in the advancement and evolution of [MARKET]. Early signs are that [MARKET] will explode in the next years!

When [PRODUCTS/SERVICES] exploded in popularity, it was often portrayed as competition for [IDENTIFY] for the attention of potential clients. Now, however, as [describe], it's becoming an alternative. But [PRODUCTS/SERVICES] do more than just serve as [DESCRIBE]. Businesses are beginning to make greater use of [PRODUCTS/SERVICES]. And new technology, services and tools are making it more useful in the enterprise.

### **6. MARKET POTENTIAL AND OPPORTUNITIES**

Clearly, [products/services] represent a major market opportunity for companies like [COMPANY] who Have distinct competitive advantages. The market is real today, and very likely to explode as [DESCRIBE] accelerates over the next several years.

Most analysts predict that the preponderance of revenues over the next several years will be mostly available to [IDENTIFY] like [COMPANIES]. However, the [IDENTIFY] are currently scrambling for position in the marketplace, incurring losses while investing heavily in [SPECIFY] and experiencing pressures to consolidate. In addition, since [SPECIFY] is currently not widely available, the preferences and desires of the ultimate consumer (both individual and corporate) have not been established. As a result, a successful business model has not yet been demonstrated, and the analysts' predictions as to the ultimate distribution of revenues in the industry are therefore very tentative, at best.

Nonetheless, because of their head start in [DESCRIBE], and because of their [COMPETITIVE ADVANTAGES], these companies currently show the best potential to monetize the latent business available from [IDENTIFY]. Since they are relatively well capitalized and consolidating, their market space will therefore be difficult for a new company to "crack." There does, however, appear to be a distinct potential for [TYPE OF] companies like [COMPANY] to partner with [IDENTIFY] by providing stepwise solutions.

#### Demand Analysis

Assumptions: Total market potential sales (in unit) X Penetration rate X Price per unit = Total potential revenue/year

## 7. RISKS AND CHALLENGES

Numerous risks and challenges exist for any company entering the [MARKET]. Some of these include the following, most of which are intuitively obvious:

Projections of growth are often based on optimistic projections by research/analysis firms who depend on industry participants for their revenues. We thus have no way of determining to what degree predictions accommodate real world situations with their many variables. Because of this consideration, the consensus of opinion may be overly optimistic and the market may grow at a substantially slower pace.

To a large degree, growth of [MARKET] is dependent on the widespread proliferation of [IDENTIFY]. While this also appears to be a certainty, external factors could intervene and limit the ability of the providers to meet their goals. Similarly, projections of deployment and penetration also are uncertain because of the analyst-industry relationships.

The revenue and income potential of the business and market is unproven. While there are many current participants, most are losing money as they scramble to develop products, services, infrastructure and market share. Since the market is continuing to develop and evolve, it is difficult to determine what business model(s) will be successful.

The market can be characterized now as new, intensely competitive, highly fragmented and rapidly changing, and it is likely to continue to be so for some time. These characteristics generally favor well-capitalized companies, of which there are several. They also favor companies with established brands and capabilities



## **8. COMPANIES AND PRODUCTS IN THE MARKET**

Most of the major "players" in the market are identified in Appendix A. Of those identified in this latter section, the following companies appear to be the main competitors for [COMPANY]:

[LIST MAJOR COMPETITORS]

## **9. CONCLUSIONS AND RECOMMENDATIONS**

- The analysis must state professional opinion, regarding the subject development feasibility from a market perspective, and what effect the products/services would have on the existing market.
- The analysis must specify the absorption period and time needed to reach market maturity.
- The analysis must determine appropriate market shares for the proposed products/services. The market study should indicate under what conditions, if any, the market penetration would become feasible.

# MARKETING PLAN

## I. EXECUTIVE SUMMARY

The Executive Summary is a synopsis of the entire marketing plan. Briefly summarize the following:

- Current Situation, Company Mission & Objectives
- Product/Service Description
- Marketing Objectives
- Major Marketing Programs & Strategy
- Expected Marketing and/or Financial Results
- Keys to Success

These points should be identified, analyzed, developed and respond to the conclusions of a market analysis.

The following questions need to be answered in the Executive Summary:

- Who? (who is your company? who is target customer?)
- What? (what is the product or service offered?)
- Where? (where is your market located? where will you be implementing your marketing activities?)
- When? (when will your plan be implemented? when do you expect the results?)
- How much? (how much profit, sales, ROI to you expect?)

## **2. ANALYSIS**

### **2.1. Market Analysis**

#### **2.1.1. Market Characteristics**

#### **2.1.2. Trends, Drivers and Timing**

#### **2.1.3. Legal, Political & Economic Factors**

#### **2.1.4. Sociocultural Factors**

#### **2.1.5. Technological Factors**

### **2.2. Sales Analysis**

### **2.3. Competitive Analysis**

#### **2.3.1. Competitive landscape**

#### **2.3.2. Key Players**

#### **2.3.3. Key Players vs. Your Company**

Select your main competitors and compare them to your company. Evaluate the performance of their marketing activities and identify the intensity and type of threat they pose, main strategies, recent initiatives and offensive tactics (directed towards your company). Briefly analyze the following elements and compare them to your company:

- Product/service offering (characteristics, features, benefits)
- Size (in terms of sales, market share, infrastructure and customer base)
- Objectives
- Strengths and weaknesses
- Brand equity: customer loyalty, brand image, brand awareness, brand recognition and brand reputation
- Past, present and future strategies
- Marketing strategies (positioning, branding, advertising, media expenditures)
- Probable actions in response to market changes and to your company
- Efficiencies in cost structure (e.g. economies of scale or scope, streamlined processes, JIT, etc.)
- Degree of vertical integration
- History of innovations
- Strength of management
- Strength of distribution

- Financial resources

#### 2.3.4. *Competitive Advantage*

- Describe your competitive capabilities, resources and competitive advantage(s)
- Compare your core competencies in relation to that of competitors

### 2.4. Customer Analysis

#### 2.4.1. *Segmentation Dimensions*

List the most pertinent segmentation dimensions for your market (e.g. demographics, behaviors, geographic regions, purchase habits, resistance to change, adopter categories [innovators, early adopters, early majority, late majority, laggards], familiarity with or access to technology, etc.)

#### 2.4.2. *Target Market*

#### 2.4.3. *Forecasted Changes*

### 2.5. SWOT Analysis

STRENGTHS	WEAKNESSES
<p>Examples: <input type="checkbox"/></p> <ul style="list-style-type: none"> <li>- Elements which provide competitive advantage <input type="checkbox"/></li> <li>- Cost structure / efficient production process <input type="checkbox"/></li> <li>- Technical know how <input type="checkbox"/></li> <li>- Very good reputation <input type="checkbox"/></li> <li>- Superior product <input type="checkbox"/></li> <li>- Highly qualified workforce <input type="checkbox"/></li> <li>- Strong relationships with key industry members</li> </ul>	<p>Examples: <input type="checkbox"/></p> <ul style="list-style-type: none"> <li>- Lack of innovation <input type="checkbox"/></li> <li>- Poor adaptability to market conditions <input type="checkbox"/></li> <li>- Lack of communication <input type="checkbox"/></li> <li>- Little financial resources <input type="checkbox"/></li> <li>- Poor management <input type="checkbox"/></li> <li>- Very long product development time <input type="checkbox"/></li> <li>- Poor brand awareness <input type="checkbox"/></li> <li>- Unreliable customer service</li> </ul>
OPPORTUNITIES	THREATS
<p>Examples: <input type="checkbox"/></p> <ul style="list-style-type: none"> <li>- Emerging markets <input type="checkbox"/></li> <li>- Growing demand <input type="checkbox"/></li> <li>- Changing customer tastes <input type="checkbox"/></li> <li>- New product uses <input type="checkbox"/></li> <li>- New regulations <input type="checkbox"/></li> <li>- New distribution channels</li> </ul>	<p>Examples: <input type="checkbox"/></p> <ul style="list-style-type: none"> <li>- New competitor <input type="checkbox"/></li> <li>- Potential loss of financial backing by X <input type="checkbox"/></li> <li>- New regulations <input type="checkbox"/></li> <li>- Declining population <input type="checkbox"/></li> <li>- Market saturation</li> </ul>

### 3. OBJECTIVES

#### 3.1. Marketing Objectives

##### 3.1.1. Short-term (annual)

Establish specific and measurable goals that express desired levels of sales, market share, brand variables, ROI, etc., over a specific timeframe and geographic/sales market. For example:

1. Improve customer loyalty (generate X% of repeat business in year 1)
2. Increase brand awareness in X market segment from X% to Y% in year 1
3. Extend reach of communications to 90% of target customers for each campaign
4. Create brand awareness for new product to be launched in fourth quarter
5. Gain at least 30 new clients in X market segment per quarter
6. Sell 100 units of product per week
7. Achieve a high level of customer satisfaction among 95% of target customers
8. Increase market share in X market segment by 5% this year
9. Reduce marketing costs by 10% over next 6 months

##### 3.1.2. Long-term (3 to 5 years)

Establish specific and measurable long-term goals that express desired levels of sales, market share, brand variables, ROI, etc., over a general timeframe and geographic/sales market. For example:

- Become the number one brand in our market in year 5
- Build strong ad awareness for product X over next three years
- Acquire 20% of our competitors' customers by year 4
- Reduce cost per acquisition to X by year X
- Make our brand synonymous with X emotional/rational elements
- Increase profit margin of product line A by X% by year 3
- Secure partnership with all major distributors in X market

### 4. MARKETING STRATEGY

#### 4.1. Market Segmentation Strategy

Identify how you will segment the market. The main types of segmentation strategies are as follows (you may choose a combination of strategies):

- Geographic Segmentation: segmenting customers based on geographic area (city, country, ZIP code, metropolitan statistical areas, time-zone, etc.)
- Product-User Segmentation: segmenting customers based on product usage (amount and/or consumption patterns of a product category or brand)

- Lifestyle Segmentation: segmenting customers based on their lifestyle (which includes: values, beliefs, attitudes, perceptions, leisure activities, preference for social events, sports interest, media usage, political views, etc.)

List the main market segments.

## 4.2. Targeting Strategy

Identify the targeting strategy adopted by your company. This will determine which market segments (established above in Section 3.1 Marketing Segmentation Strategy) you will focus on. The three main targeting strategies are:

- Mass Marketing: go after the market as a whole with one offer that answers common needs
- Differentiated Marketing: go after several market segments with offers tailored to each
- Target Marketing: go after a small segment or sub-segment with a tailored offer

### 4.2.1. Target Market

Identify the selected target market(s). Provide the profile of your target market according to the following:

- Demographics
  - Age
  - Gender
  - Social status
  - Occupation
  - Religion
  - Ethnicity
  - Income
  - Social class
- Factors Affecting Behavior
  - Lifestyle
  - Attitudes and beliefs
  - Perceptions
  - Personality
  - Adopter category (innovators, early adopters, early majority, late majority, laggards)
- Consumption and use patterns
  - Buying motives
  - When, where and how they buy
  - Usage rate
  - How often they buy
  - Types of important buying situations
  - Who makes the buying decision and who does the buying?
- Marketing and Brand dimensions
  - Specific responses to marketing campaigns
  - Openness to marketing
  - Familiarity with brand
  - Do they select a product based on brand or product attributes?

- Brand loyalty
- Customer satisfaction
- How they choose between competing brands
- Nature of your relationship with customers
  - Face-to-face, telephone, Internet, mail
  - Closeness of the relationship
  - How often is their feedback requested?
  - How often do you communicate with them?

### 4.3. Product Life Cycle

Identify the developmental stage of your product (i.e. the degree of acceptance your product has earned in the market) and identify the appropriate message to convey in your advertising.

The three primary stages are:

- Pioneering stage
  - The advertising used in this stage introduces a new concept, changes habits and educates.
- Competitive stage
  - The advertising used in this stage establishes your product's superiority over competing products.
- Retentive stage
  - The advertising used in this stage simply reinforces or reminds customers of the qualities and acceptance your product is already recognized for.

### 4.4. Potential Strategies

#### 4.4.1. Strategy Formulation

List the major marketing strategies that are available to your company. Provide the underlining segmentation and targeting strategy and briefly describe the major elements of the marketing mix for each strategy (product, place, promotion, price). Marketing strategies may be based on the following generic business strategies:

- Differentiation Strategy
  - Marketing strategy will involve differentiating your company from competitors by highlighting key variables such as price, quality, features, customer service, etc.
- Cost Leadership Strategy
  - Marketing strategy may involve cost-cutting initiatives across the distribution/production process and/or may involve offering a heavily discounted and standard product to all market segments
- Differentiation Focus Strategy or Niche Strategy
  - Niche marketing strategy will focus on a very distinct, usually small and overlooked market segment, and all marketing mix elements will be tailored specifically to this segment

- Cost Focus Strategy
  - Marketing strategy will involve offering a basic low-cost product to a small market segment

#### **4.4.2. Positioning Strategy**

Describe the company's unique selling proposition and how you differentiate yourself from your competitors. Provide company's positioning strategy or positioning strategy per product or per product family. Provide slogan or positioning statement for company and per product. Positioning strategies can be based on the following:

- Product attributes
- Product benefits
- Meeting a need that is not being satisfied by competitors
- Customer usage occasions/patterns
- Users
- Direct comparison to competitor
- Avoiding competitors
- Product classes

Indicate whether positioning will remain constant across different target segments, if not provide positioning per segment

#### **4.4.3. Branding**

Provide branding strategies based on positioning. Detail the brand names and elements:

- Corporate style guide
- Company and product logo/slogan
- Brand identity, personality and associations
- Brand names (trademarks)
- Packaging

## **5. MARKETING PROGRAMS**

### **5.1. Marketing Mix**

Identify main products; identify key product attributes (e.g. features, quality, wide or deep product assortment, packaging, trust/warranty, etc.) that will be or have been implemented in response to target market's needs and according to marketing strategy; identify how/when new products will be introduced or failing ones dropped

### **5.2. Pricing**

Describe how selling price will be determined; compare price(s) in relation to costs.



### **5.3. Distribution**

Specify the role of distribution as it applies to the marketing strategy (e.g. exclusive distribution, penetrate the whole market, selective distribution); specify the type of distribution channel(s) (e.g. direct/indirect selling, number and type of intermediaries retailer, wholesaler, distributors, agents)

### **5.4. Market Research**

Identify customer information needed to successfully implement marketing programs and how market research information will be obtained, stored and updated.

## **6. IMPLEMENTATION PLAN**

### **6.1. Product Development**

### **6.2. Marketing & Sales**

### **6.3. Distribution Network**

### **6.4. Required Resources**

### **6.5. Implementation Plan**

## **7. EVALUATION AND PERFORMANCE MONITORING**

## **8. FINANCIAL INFORMATION**

# ANNEX D: TEMPLATE FOR MARKET STUDY AND MARKETING PLAN (FRENCH)

## PLAN D'ÉTUDE DE MARCHÉ

### I. INTRODUCTION

#### I.1. OBJECTIF

Le présent rapport contient les résultats de l'étude de marché conduite par [CABINET AYANT RÉALISÉ L'ÉTUDE]. L'étude a pour objet d'identifier les caractéristiques générales, les tailles et les tendances des marchés des [PRODUITS/SERVICES]. Lesdits marchés incluent ceux relatifs à [SPÉCIFIER]. Plus particulièrement, l'étude vise à caractériser et à quantifier les tendances déterminantes pour les PRODUITS/SERVICES de [ENTREPRISE] ainsi que celles liées aux sous-secteurs des consommateurs de [MARCHÉS]. L'étude porte sur [NOMBRE] marchés primaires de [ENTREPRISE] - [PAYS] -, mais inclut également quelques informations non exhaustives sur les autres régions du monde.

#### I.2. APPROCHE ET MÉTHODOLOGIE

Pour atteindre cet objectif, [CABINET AYANT RÉALISÉ L'ÉTUDE] a collecté et analysé les informations sur les marchés importants ainsi que des renseignements sur les applications de technologies provenant de sources connues et pouvant être utiles à la réalisation d'un tel objectif. Parmi ces sources, on peut citer de nombreuses études de marché, des bases de données spécifiques sur le secteur accessibles à travers des portails commerciaux, ou "portails", ainsi que ceux accessibles par l'Internet. Les sources comprennent les nombreuses bases de données développées par plus d'une dizaine de cabinets d'études et de recherches (dont, [NOMS], en plus de nombreuses sources sur les échanges, les tendances, et technologies spécifiques au secteur. [CABINET AYANT RÉALISÉ L'ÉTUDE] a compilé des informations extraites de rapports publiés ou non pour faire des analyses adéquates.

La stratégie adoptée par [CABINET AYANT RÉALISÉ L'ÉTUDE] a été la suivante :

1. Le développement de stratégies de recherche permettant d'avoir des informations d'ordre général sur le marché ainsi que des données spécifiques relatives aux marchés [MARCHÉS] en général, et au concept de [ENTREPRISE] en particulier;
2. L'intégration de ces stratégies par une méthode "Boolean" ou tout autre outil de formulation de commande de recherches applicables aux sources d'informations spécifiques;
3. La conduite des recherches sur les bases de données appropriées;
4. Le filtrage et l'organisation des informations obtenues en adéquation avec leur utilisation finale;
5. L'analyse et le rapprochement des différences entre les données obtenues au niveau des différentes sources;

6. L'analyse des informations obtenues en relation avec les objectifs de l'étude;
7. La présentation du résultat analytique d'une manière assez concise pour permettre au client et aux investisseurs potentiels de disposer des informations essentielles.

### **I.3. L'ÉQUIPE**

Cette étude a été le résultat d'une collaboration et d'une combinaison des expertises et de l'expérience de [NOM] et de [NOM]. Vous trouverez les détails sur le parcours des membres de l'équipe en annexe du présent document.

## **2. RÉSUMÉ DE L'ÉTUDE**

En [MOIS, ANNÉE], [CABINET AYANT RÉALISÉ L'ÉTUDE] a conduit une étude de marché exhaustive pour déterminer [SPÉCIFIER]. L'étude visait à répondre aux [NOMBRE] questions clés ci-après :

- I. Quel est le marché cible?
  - a. Quelle est sa taille en terme de revenu potentiel?
  - b. Quels sont les principaux canaux de distribution?
  - c. Quels sont les produits/services que le client potentiel désire?
  - d. Quelle est la caractéristique principale des clients potentiels pouvant acheter les produits/services?
2. Quel est le revenu moyen des clients potentiels pouvant acheter les produits/services?
  - a. Combien les clients seraient-ils prêts à payer pour les produits/services?
  - b. Qui sont les principaux concurrents?
  - c. Quelles sont les barrières d'entrée?
  - d. La société [NOM] dispose-t-elle d'un avantage compétitif?

Ce résumé prend en compte chacune de ces questions. À la suite du résumé, les détails des résultats de la recherche pour chaque question sont présentés sous forme de tableau.

### **2.1. Points Clés**

La réaction générale par rapport aux [PRODUITS/SERVICES] est très forte, près de [%] des personnes interrogées indiquent qu'elles désirent fortement les utiliser; [%] des personnes interrogées affirment qu'il est très probable qu'elles les utilisent. Le degré d'intérêt par rapport à ces aspects a certes été mesuré avant les aspects liés aux prix du produit/service, mais il reflète néanmoins un niveau très élevé d'intérêt pour les produits/services en tant que tels.

La taille du marché pour les [PRODUITS/SERVICES] a été difficile aussi bien à quantifier qu'à évaluer. Des estimations faites, il ressort que les composantes du marché sont actuellement très consistantes et pourront croître assez rapidement au cours des toutes prochaines années en milliards de dollars. Pour le [PAYS] les estimations du marché potentiel [PRODUITS/SERVICES] vont de [MONTANT] à [MONTANT] pour l'année en cours, avec une croissance annuelle de [MONTANT]. Le marché [PAYS] est estimé à près de [MONTANT] pour cette année avec une croissance annuelle de [MONTANT].

[PRODUITS/SERVICES] de [ENTREPRISE] semblent bien assortis pour répondre aux besoins de ce marché. Les [IDENTIFIER LES CLIENTS ET PARTENAIRES] représentent des candidats potentiels pour des relations profitables.

Le segment de marché du secteur - avec son modèle d'affaires à succès - représente une autre opportunité de gain pour les entreprises qui peuvent faciliter de façon efficace et efficiente [DÉCRIRE]. Les solutions de [ENTREPRISE] semblent être en adéquation avec ce large marché. Une autre catégorie de clients potentiels est représentée par [IDENTIFIER] et dispose d'un [DÉCRIRE].

### **3. DEFINITION DU PROBLEME**

Dans un environnement économique mondial où ce sont les clients qui décident des règles du jeu, les entreprises qui misent sur l'information et la connaissance sont devenues les pionnières dans la création d'un avantage compétitif. Depuis que nous sommes entrés dans l'ère de l'information, le pouvoir sur le marché est passé des mains des vendeurs à celles des acheteurs. Il reste cependant beaucoup à faire quant à la gestion des relations avec les clients pour combler le fossé qui existe entre ces derniers et les vendeurs. La solution serait en partie d'arrêter de vendre, et de renforcer la capacité des clients à acheter.

Personne n'a dit que le consumérisme était chose facile. D'un côté, le pauvre client a en face de lui un nombre ahurissant de propositions de biens et de services. De l'autre, les vendeurs sont confrontés à un marché diversifié et fragmenté qui rend plus complexe la définition des analogies réelles entre les clients. Il ne faut pas oublier les milliards de dépenses inutiles effectuées sur les achats ratés et les campagnes marketing sans succès qui remplissent inutilement les boîtes postales et aliènent les clients. L'avènement de l'Internet a intensifié ce problème en offrant aux clients un plus grand choix, plus de concurrence aux vendeurs, et de nouveaux canaux de communication aux publicistes.

De façon plus spécifique, l'étude de marché vise à :

La définition du problème doit révéler qu'il existe une demande potentielle suffisante pour les [PRODUITS/SERVICES] tels qu'ils sont proposés.

### **4. TAILLE ET TENDANCES DU MARCHÉ**

#### **4.1. DEFINITION DU SEGMENT(S) CIBLE(S) DU MARCHÉ**

Le marché cible est celui des [DÉCRIRE]. L'analyse doit décrire et justifier les bases de la définition des limites du marché cible. L'utilisation des facteurs démographiques et géographiques est fortement conseillée. Les segments secondaires du marché doivent être délimités comme sous composantes du marché, bien que l'étude doive fixer les bases de prise en compte du marché secondaire.

### **5. APERÇU ET CARACTÉRISTIQUES DU SECTEUR**

Les avancées techniques, le niveau de développement du marché ainsi que les réactions des premiers utilisateurs indiquent bien que les [PRODUITS/SERVICES] ont un rôle important à jouer dans la croissance et l'évolution du marché de [MARCHÉ]. Les premiers signes montrent que le [MARCHÉ] va exploser dans les prochaines années!

Si les [PRODUITS/SERVICES] ont connu une explosion en popularité, ils sont souvent considérés comme des produits/services concurrents pour [IDENTIFIER] aux yeux des clients potentiels. Toutefois,

au fur et à mesure que [DÉCRIRE], ses produits/services deviendront une alternative qui fera bien plus que simplement servir [DÉCRIRE]. Les entreprises sont de plus en plus nombreuses à utiliser [PRODUITS/SERVICES] et les nouvelles technologies, les services et les outils les rendent de plus en plus faciles à employer.

## 6. POTENTIEL ET OPPORTUNITÉS DU MARCHÉ

Il est clair que [PRODUITS/SERVICES] représente une opportunité de marché importante pour des entreprises comme [ENTREPRISE] qui disposent d'un avantage compétitif. Le marché existe effectivement, et pourrait exploser au fur et à mesure que [DÉCRIRE] va s'étendre au cours des prochaines années.

La plupart des experts prévoient que la prépondérance des revenus au cours des prochaines années sera surtout effective pour [IDENTIFIER] comme [LES ENTREPRISES]. Toutefois, les [IDENTIFIER] se bousculent pour se positionner sur le marché, subissant des pertes lorsqu'elles investissent fortement dans [SPÉCIFIER] ainsi que des pressions de consolidations. Par ailleurs, puisque [SPÉCIFIER] n'est pas actuellement largement disponible, les préférences et les désirs des utilisateurs (tant des individus que des entreprises) ne sont pas encore établis. Par conséquent, il n'existe pas de concept dont le succès ait été déjà démontré, et les prédictions des experts quant à la distribution des revenus au sein du secteur sont au mieux à prendre avec beaucoup de précautions.

Compte tenu du fait qu'elles sont lancées dans [DÉCRIRE], et du fait de leur [AVANTAGES COMPÉTITIFS], ces entreprises montrent actuellement leur fort potentiel à monnayer le potentiel d'affaires existant pour [SPÉCIFIER]. Si elles sont relativement bien fournies en capital et se consolident, il sera difficile pour une nouvelle entreprise de leur arracher leur part de marché. Cependant, il est évident qu'il existe un potentiel clair pour les entreprises du [TYPE D'ENTREPRISE] telles que [ENTREPRISE] de s'associer avec [IDENTIFIER] pour fournir des solutions plus efficaces.

### 6.1. Analyse de Demande

**Hypothèses :** Total des ventes potentielles du marché (en unités) X Taux de pénétration X Prix unitaire = Revenu total potentiel /an

## 7. RISQUES ET DÉFIS

Il existe plusieurs risques et défis auxquels doit faire face tout entrant sur le marché. Certains d'entre eux sont énumérés ci-dessus. La plupart sont intuitivement évidents.

Les prévisions de croissance sont pour la plupart basées sur des prévisions optimistes effectuées par les cabinets d'étude de marché qui dépendent de la contribution des acteurs du secteur quant à leurs revenus. Il ne nous a pas été possible de savoir à quel point les prédictions sont conformes à la situation réelle surtout avec les nombreuses variables qu'elles ont prises en compte. Pour cette raison, le consensus sur l'opinion pourrait se révéler trop optimiste et le marché pourrait croître à une vitesse largement plus lente.

La croissance du marché [MARCHÉ] dépend en grande partie de la prolifération répandue de [SPÉCIFIER]. Même si ceci reste une évidence, des facteurs externes peuvent intervenir et limiter la capacité des fournisseurs à atteindre leurs objectifs. De même, les prévisions de déploiement et de pénétration restent incertaines à cause des relations existantes entre les analystes et le secteur.

Les prévisions de vente et de bénéfice du secteur et du marché restent à prouver. Alors qu'il y a actuellement plusieurs acteurs sur le marché, la plupart ne sont pas rentables lorsqu'ils essayent de développer les produits, les services, les infrastructures et leur part de marché. Dans un marché qui continue de se développer et d'évoluer, il est difficile de savoir quel concept connaîtra le succès.

Étant donné que le marché est pour le moment nouveau, il peut être caractérisé par une forte concurrence, une forte fragmentation et une mobilité rapide, et pourrait rester ainsi pour longtemps encore. Ces caractéristiques générales favorisent les entreprises disposant de grands moyens de financement. Elles favorisent également les entreprises ayant des marques déjà établies et de fortes capacités.

## **8. POSITIONNEMENT DE L'ENTREPRISE ET DE SES PRODUITS SUR LE MARCHÉ**

La plupart des acteurs majeurs du marché sont énumérés dans l'Annexe A. Parmi les entreprises citées dans ladite section, les entreprises suivantes semblent être les principaux concurrents de [ENTREPRISE] :

[ÉNUMÉRER LES PRINCIPAUX CONCURRENTS]

## **9. CONCLUSIONS ET RECOMMANDATIONS**

- L'analyse doit mettre en évidence l'opinion du professionnel quant à la faisabilité du développement du concept du point de vue du marché ainsi que l'impact que les produits/services auront sur le marché existant.
- L'analyse devra préciser le temps de pénétration ainsi que le temps nécessaire pour atteindre la maturité du marché.
- L'analyse devra déterminer les parts de marché adéquates pour les produits/services proposés. L'étude de marché devra indiquer les conditions suivant lesquelles, s'il y en a, la pénétration du marché sera plus facile.

# PLAN DE MARKETING

## I. SOMMAIRE EXECUTIF

Le Sommaire exécutif est un résumé représentatif de votre plan marketing dans son ensemble. Puisque la plupart des investisseurs lisent uniquement cette section afin de déterminer s'ils passeront plus de temps à analyser et évaluer votre plan marketing et votre entreprise, ce résumé doit énumérer les principaux éléments de votre plan et inciter à une lecture de l'ensemble du plan marketing.

- Résumez brièvement les points suivants:
- La situation actuelle, la mission, les objectifs
- La description des produits/services
- Les objectifs marketing
- Les principaux programmes marketing
- Les résultats marketing et/ou fiscaux
- Facteurs-clés de succès

Ces points devraient être identifiés, analysés, développés et répondre aux conclusions d'une étude des marchés.

Les sujets développés ci-dessus devront contenir les réponses aux questions suivantes:

- Qui ? (Qui est votre compagnie ? Quelle est sa clientèle cible ?)
- Quoi ? (Quel est le produit ou service offert ?)
- Où ? (Où est situé votre marché ? Où allez-vous déployer vos activités marketing ?)
- Quand ? (Quand allez-vous mettre en œuvre votre plan ? Pour quand espérez-vous les résultats ?)
- Combien ? (Quel est le profit, le volume des ventes, le retour sur investissement attendu ?)

## **2. ANALYSE DE LA SITUATION**

### **2.1. Analyse du secteur**

#### ***2.1.1. Les caractéristiques du marché***

#### ***2.1.2. Tendances et facteurs déterminants***

#### ***2.1.3. Facteurs législatifs, politiques et économiques***

#### ***2.1.4. Les facteurs socioculturels***

#### ***2.1.5. Facteurs technologiques***

### **2.2. Analyse des ventes**

### **2.3. Analyse concurrentielle**

#### ***2.3.1. État de la concurrence***

#### ***2.3.2. Acteurs majeurs***

#### ***2.3.3. Les facteurs-clés par rapport à votre compagnie***

Analysez brièvement les éléments suivants et comparez-les à votre entreprise:

- Produit/service qu'ils offrent (caractéristiques, particularités, avantages)
- Taille (en termes de vente, de part de marché, infrastructure et clientèle de base)
- Objectifs
- Forces et faiblesses
- Caractéristique de la marque : fidélité de la clientèle, image de marque, notoriété de la marque, reconnaissance et réputation de la marque
- Stratégies passées, présentes et futures
- Stratégie marketing (positionnement, stratégie de marque, publicités, achats médias)
- Actions probables en réponse à des changements sur le marché et ou dans votre compagnie.
- Efficience de la structure des coûts (ex : économies d'échelle, économies de gamme, degré d'automatisation des processus, JIT, etc.)
- Degré d'intégration verticale
- Historique des innovations
- Forces liées aux pratiques et capacités de gestion
- Forces liées aux circuits de distribution
- Ressources financières



### 2.3.4. *Avantage Compétitif*

Décrivez vos capacités concurrentielles, vos ressources et avantages compétitifs. Comparez vos capacités essentielles à celles de vos concurrents

## 2.4. *Analyse de la clientèle*

### 2.4.1. *Facteurs de segmentation*

Énumérez les facteurs de segmentations les plus pertinents pour votre marché (ex : démographie, comportement, régions géographiques, habitudes d'achat, résistance au changement, catégories d'adoption [les innovateurs, les adoptants précoces, la majorité qui initie, la majorité qui suit, les retardataires], maîtrise ou accès à la technologie)

### 2.4.2. *Marché cible*

### 2.4.3. *Changements prévus*

## 2.5. *Analyse des forces, faiblesses, opportunités et menaces*

<b>FORCES</b>	<b>FAIBLESSES</b>
Exemples : <ul style="list-style-type: none"><li>- Éléments permettant d'avoir un avantage compétitif</li><li>- Structure des coûts / processus de production efficient</li><li>- Savoir-faire technique</li><li>- Très bonne réputation</li><li>- Produit supérieur</li><li>- Main d'œuvre hautement qualifiée</li><li>- Très bonnes relations avec les acteurs-clés du secteur</li></ul>	Exemples : <ul style="list-style-type: none"><li>- Absence d'innovation</li><li>- Faible capacité d'adaptation aux conditions du marché</li><li>- Faibles ressources financières</li><li>- Faible capacité de gestion</li><li>- Temps de développement très long</li><li>- Faible réputation de la marque</li><li>- Service à la clientèle peu crédible</li></ul>
<b>OPPORTUNITÉS</b>	<b>MENACES</b>
Exemples : <ul style="list-style-type: none"><li>- Marchés émergents</li><li>- Demande en croissance</li><li>- Changements dans les goûts des clients</li><li>- Nouvelles réglementations</li><li>- Nouveaux canaux de distribution</li></ul>	Exemples : <ul style="list-style-type: none"><li>- Nouveaux concurrents</li><li>- Perte potentielle de la surface financière de X</li><li>- Nouvelles réglementations</li><li>- Déclin démographique</li><li>- Saturation du marché</li></ul>

## 2.6. *Analyse des activités marketing (si vous en avez)*

### 2.6.1. *Analyse du programme marketing de la compagnie*

Décrivez les stratégies utilisées pour chaque segment du marché

- Stratégie de ciblage
- Stratégie de positionnement
- Stratégie de marque

- Stratégie de publicité
- Stratégie de promotion
- Stratégie de relations publiques

#### **2.6.2. Analyse des ressources et des indicateurs de performances**

#### **2.6.3. Forces de la marque**

### **3. OBJECTIFS**

#### **3.1. Les objectifs globaux de la compagnie**

#### **3.2. Les objectifs marketing**

##### **3.2.1. Court terme (année à venir)**

Déterminez les objectifs spécifiques et mesurables établissant les niveaux désirés de ventes, de part de marché, des variables de la marque, de retour sur investissement, etc., sur une période donnée et sur un marché géographique ou territoire de vente. Par exemple:

1. Améliorez la satisfaction de la clientèle (générer X % d'achat répété au cours de l'année I)
2. Accroître la notoriété de la marque dans un segment X du marché de X % à Y % au cours de l'année I
3. Étendre la couverture de nos communications à 90 % de la clientèle cible pour chaque campagne
4. Créer une notoriété pour les produits à lancer dans le quatrième trimestre
5. Gagner au moins 30 nouveaux clients dans chaque segment du marché par trimestre
6. Vendre 100 unités de notre produit par semaine
7. Atteindre un niveau élevé de satisfaction de la clientèle auprès de 95 % de nos clients cibles
8. Faire croître la part de marché dans un segment X de 5 % cette année
9. Réduire les coûts marketing de 10 % sur les trois prochaines années

##### **3.2.2. Long terme (3 à 5 années)**

Déterminez les objectifs spécifiques et mesurables établissant les niveaux de vente, de part de marché, des variables de la marque, de retour sur investissement, etc. souhaitables pour une période donnée et sur un marché géographique ou territoire de vente. Par exemple:

## 4. STRATÉGIE MARKETING

### 4.1. Stratégie de segmentation

1. La segmentation géographique : une segmentation basée sur la situation géographique des clients (ville, pays, code postal, zone à caractère urbain, le fuseau horaire, etc.)
2. Segmentation par utilisateur : une segmentation basée sur l'utilisation du produit (montant et/ou fréquence et méthode de consommation d'une catégorie du produit ou de la marque)
3. Segmentation orientée style de vie : segmentation basée sur le style de vie (dont les valeurs, les croyances, les performances, les loisirs préférés, sport préféré, média suivi, opinion politique, etc.)

Listez les principaux segments du marché.

### 4.2. Stratégie de ciblage

Identifiez la stratégie de ciblage adoptée par votre compagnie. Cette stratégie déterminera les segments du marché (établis dans la Section 3.1) sur lesquels vous allez vous concentrer. Les trois principales stratégies de ciblage sont:

1. Marketing de masse : viser un marché global avec une seule offre répondant à des besoins communs
2. Marketing différencié : viser plusieurs segments du marché avec des offres adaptées à chaque segment
3. Marketing de niche : viser un petit segment ou un sous segment avec une offre différenciée et "faite sur mesure"

#### 4.2.1. *Marché cible*

Identifiez le(s) marché(s) cible(s) visé(s). Décrivez le profil de votre marché cible de la manière suivante:

- Facteurs démographiques
- Facteurs psycho-graphiques
  - Style de vie
  - Attitudes et croyances
  - Consommation et mode d'utilisation
  - Motifs d'achat
  - Quand, où et comment ils achètent ?
  - Fréquence d'utilisation
  - Fréquence d'achat
  - Types de situations d'achats importants
  - Qui prend la décision d'achat et qui achète

- Aspects marketing et caractéristiques de la marque
  - Connaissance de la marque
  - Choisisent-ils les produits selon la marque ou des attributs du produit?
  - Fidélité par rapport à la marque
  - Satisfaction de la clientèle
  - Quels critères les clients utilisent-ils dans le choix entre les marques en concurrence ?
- Nature des relations avec les clients
  - Face-à-face, téléphone, Internet, courrier
  - Proximité de la relation
  - Leur feedback est demandé à quelle fréquence ?
  - A quelle fréquence communiquez-vous avec eux ?

### 4.3. Cycle de vie du produit

Identifiez la phase de développement de votre produit (c'est-à-dire le niveau d'acceptation que votre produit a gagné sur le marché) et identifiez les principaux messages à véhiculer à travers vos publicités.

Les trois phases principales sont:

1. La phase pionnière
  - a. La publicité utilisée durant cette phase vise à introduire un nouveau concept, à changer les habitudes et à éduquer/sensibiliser
2. La phase concurrentielle
  - a. La publicité utilisée durant cette phase vise à établir la supériorité de votre produit par rapport aux produits concurrents
3. La phase de rétention
  - a. La publicité utilisée durant cette phase vise tout simplement à renforcer et à rappeler aux clients les qualités et la réceptivité pour lesquelles votre produit est reconnu

### 4.4. Stratégies potentielles

#### 4.4.1. Formulation de stratégie

**Stratégie de différenciation** La stratégie marketing consiste à différencier votre compagnie de vos concurrents en énumérant les facteurs clés tels que le prix, la qualité, les caractéristiques du produit, le service à la clientèle, etc.

- Stratégie de leadership par le coût:
  - La stratégie marketing inclut des initiatives de réduction de coût le long du processus de distribution/production et/ou pourrait consister à offrir un même produit à des prix très réduits à tous les segments du marché

- Stratégie de différenciation par la concentration sur un segment ou Stratégie de niche
  - La stratégie de niche marketing est utilisée pour se concentrer sur un segment de marché distinct, souvent petit et peu perçu et pour orienter de façon spécifique les éléments du marketing mix sur ce segment
- Stratégie de concentration sur un segment à travers un leadership par le coût
  - La stratégie marketing consistera à offrir un produit à prix réduit à un petit segment du marché

## **5. LES PROGRAMMES MARKETING**

### **5.1. Marketing Mix**

Enumérez les principaux éléments de votre marketing mix (détaillé ci-dessous). Justifiez le timing et la séquence de tous les éléments et expliquez comment ils interagissent pour créer une synergie.

### **5.2. Prix**

- Décrivez comment les prix de vente seront déterminés
- Décrivez les stratégies de prix (prix d'écrouissage du marché, prix de pénétration du marché, offre des prix les plus bas, fixation du prix en fonction de la situation géographique, vente de produit en package, etc.) ainsi que sa relation avec la stratégie marketing
- Comparez les prix par rapport aux coûts
- Dites quel est le planning de réduction des prix
- Dites quels sont les facteurs d'ajustement du prix (prix du marché international, réaction au prix des concurrents, prix par zone géographique, etc.)

### **5.3. Distribution**

- Dites quel sera le rôle spécifique de la distribution dans la stratégie marketing (ex : distribution exclusive, pénétration de tout le marché, distribution sélective)
- Identifiez les zones géographiques et territoires de vente couverts
- Spécifiez les types de canaux de distribution (ex. vente directe/indirecte/personnalisée, nombre et nature des intermédiaires [détaillants, grossiste, distributeurs, agents])
- Dites s'il y a des intermédiaires tels que :

### **5.4. Recherche des marchés cibles**

Identifier les informations sur la clientèle ciblée, fin de mener un programme de marketing

## **6. PLAN DE MISE EN OEUVRE**

### **6.1. Conception et développement de produit**

### **6.2. Marketing et vente**

### **6.3. Les distributeurs**

### **6.4. Besoins en ressources**

### **6.5. Programmation**

## **7. ÉVALUATION DES PERFORMANCES ET MONITORAGE**

## **8. LES INFORMATIONS FINANCIÈRES**

### **8.1. Prévisions des ventes (2-5 ans)**

# ANNEX E : REFERENCE LIST

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